



# CPCA Certification Training, Prep & Practice

## Foundational Level

This accredited program teaches you the foundations of Category Management, including the process and how it works, the data and the basic analytics. It is designed to give a solid grounding in the category management process, basic assessment and the category tactics and other fundamentals you need to understand and practice category management in your role in retail / CPG / FMCG.

This training program will give you the training required to be tested for the **Certified Professional Category Analyst (CPCA)** level if you are interested in industry certification.

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# Certification Training

## CPCA Category Management Training Program

This **accredited program** teaches you the foundations of Category Management - including the process and how it works, the data and the basic analytics - and will prepare you for category management certification at the CPCA level (for those interested in certification). It's designed to give a solid grounding in the category management process, basic assessment and the category tactics and includes a set of online courses that will give you the fundamentals to understand and practice category management in your role in retail / CPG / FMCG.

If you're interested in category management certification, this program will prepare you for the CPCA designation with the CMA, and meets 10 of 10 learning requirements for the CPCA designation.

### Program Curriculum

- Category Management Overview
- Retailer Strategy
- Category Definition and Segmentation
- Category Roles
- Category Strategies
- Understanding and Using Data
- Category Assessment
- Category Tactics and Analytics
- Category Management on Limited Data
- Develop and Implement the Category Plan
- Building PowerPoint and Presentation Skills
- Building Excel Skills

### Program Details

- Approximately 35–40 hours to complete
- No Prerequisites

## Exam Preparation Package for CPCA Accreditation

This category management certification **exam preparation package** consists of full practice exams, as well as a set of mini-exams for each learning requirement. These mini-exams will give you valuable feedback and additional resources to boost your knowledge in areas where you need help. You have 3 opportunities to complete each of the mini-exams with each question giving you multiple opportunities to answer so that you can practice and feel ready for the CMA exams.

To best prepare, we recommend you use a combination of training and/or exam preparation. These materials will help you prepare for the tests, but do not guarantee that you will pass them.

# Program Highlights

## **Understanding the Category Management Process**

Develop a deeper understanding of how the process works, who owns it and overall strategic considerations associated with the catman foundations. This piece is missing for many organizations, and will help you strategically understand the process and details of each step.

## **Data and Analytics**

A big part of category management is around data and analytics – not only understanding the key data sources, but knowing how to drill through them for insights, and turn the opportunities into action through the category tactics. Learn how to effectively approach and analyze basic data, draw relevant insights, and make the best tactical recommendations for your categories.

# Program Curriculum

Below, you'll find a short summary of each of the courses in the CPCA program.

## Category Management Overview

It's important to have a strong understanding of category management, how it works, and why it's important for your business. You'll learn what category management is, the different perspectives to consider, the key steps of the process and details of each one, and the importance of understanding retail strategy.

## Retailer Strategy

Category management is a retail-driven process, so you need to understand overall retailer strategies in order to be successful in category management. You'll learn what should be included in a retailer's overall strategy and the importance of both articulating and understanding the strategy (from both a retailer and supplier's perspective).

## Category Definition & Segmentation

One of the important catman foundations is proper category definitions and segmentations based on the consumer decision tree. You'll learn how to define a category from the Shopper's point of view, and then segment the items that are assigned to a category to reflect the consumer decision tree.

## Category Roles

By establishing category roles, a retailer will determine the most important categories for their Shoppers, as well as the corresponding tactics that match best with each category role. You'll learn how to assign category roles across a retailer's categories, and how these role assignments should be reflected in a store layout. You'll also learn how tactics should be strategically applied to each category role for an aligned approach.

## Category Strategies

Category strategies take category roles one step further, with consideration for how the category Shopper shops, and what's most important to the most loyal and heavy buyers in the category. You'll learn about the different category strategies, and how these strategies further influence the category tactics.

## Understanding & Using Data

Before you analyze data, you need to ensure that you have a solid foundation of understanding the key data sources and how to use data. You'll develop these data foundations, including an 8-step analytic process to set you up for success, and a review of the different types of standard catman data and their strengths & watch outs (retail POS, retail measurement, consumer panel and other data sources).

## Category Assessment

Now that you've got your strategic foundations in place, you're ready to analyze the category through a category assessment. You'll learn how to drill down through data, determine the most and least developed brands & segments, and learn many calculations that are included in a standard category assessment. You'll complete some hands-on workshop to try out some of the calculations and learn how to draw insights from the data.

## Category Management on Limited Data

Most of us are in some type of limited data environment – and it's important to understand how to maximize the use of the data you DO have access to. Because you don't have access to all of the data sources doesn't mean you can't do category management – you're just a bit more limited in your approach. You'll learn about different report layouts and perspectives, with suggestions for specific data gaps in your business (including the category tactics).

## Develop & Implement a Category Plan

Development of the category plan is the ultimate goal of the category assessment, and sets up the category for success. You'll learn what should be included in the category plan and what to include in it, and how to develop an implementation plan to ensure success of the entire plan.

## Building Excel Skills

In today's world, and all of the data and reports that we have access to, you typically require strong Excel skills. This isn't your typical Excel course – it's broken into mini-modules where you'll learn everything from the basics to more advanced topics using examples and perspectives related to category management. It covers range names, absolute and relative references, basic formula writing, custom formats, custom lists, text functions and VLOOKUP and HLOOKUP formulas.

## Building PowerPoint & Presentation Skills

Many of us use PowerPoint on a regular basis, but have never learned how to properly use it. You'll build your skills in technical and tactical functionality of PowerPoint, learn how to create logic and flow in your presentations through a 5-step process, and develop the skills to deliver an impressive presentation.

*WE'D LOVE TO HEAR FROM YOU.*

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*Train Ahead.*

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# 4 Ways to Become More Strategic Using CatMan Foundations

## How does category management help you build your business?

### 1. Understand different perspectives to uncover more opportunities

There are 3 perspectives that should be considered in category management:

1. **Retailer Perspective:** Every Retailer has unique strategies, Shoppers, formats and approaches. By better understanding each, you will develop better solutions to help them achieve their objectives.
2. **Category Perspective:** Most Retailers have structured their business around categories (or items that offer similar solutions to Shoppers). If you're only looking at the business from a brand perspective, your recommendations may overlook important implications on the Retailer's total category business. You're also limiting the opportunities for both national brands and store brands by not looking at a bigger picture perspective.
3. **Shopper Perspective:** If you have Shopper insights / marketing in your organization, it needs to align with the Retailer, their category approach and their Shoppers. This is best done by incorporating Shopper into the overall assessment and opportunity identification done through a category assessment (see more details in #3 below).

### 2. Learn how to develop category/business/Shopper insights

We have more access to data than we have ever had in the past. In some regions / markets / industries the set of data may not be as robust, but you most likely have more data than ever before.

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*It's better to make fact-based decisions that tie in with our knowledge of the business, rather than to rely only on intuition or experience to make decisions.*

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Learning how to drill down through data (whether it's market data, consumer panel data, warehouse data, shipment data) is an essential skill that will help you take your analytics to a whole new level, particularly if you're incorporating the insights with the strategic understanding that you developed in #1 above.

### **3. Build skills in the tactics**

Many of us spend time and money on driving the tactics (assortment, space management, pricing, promotion), ultimately to drive sales and profits for our brands / categories / business. But how do you know that the recommendations that you are making are the right ones for your business? Most Retailers do not (or should not) make decisions on each of the tactics on a brand-by-brand basis.

Start turning your data into action through the category tactics. You can learn how to become more strategic in your approach for each tactic, and learn how to effectively analyze and determine the biggest areas of opportunity for your business.

### **4. Develop presentation skills**

A big area of opportunity for many organizations is to develop fact-based presentation and selling skills across their teams. Traditional sales approaches are no longer working, and we can't rely on relationships alone to sell our ideas anymore. anyone who develops sales presentations or business reviews need to learn how to apply fact-based principles into a logical, well-formed presentation. Without a persuasive approach, great ideas can get lost in a poorly developed presentation.

### **5. Five Benefits of Moving to a More Strategic Approach grounded in the principles of category management**

1. Uncover new ideas and opportunities to build your business that considers the bigger picture perspective
2. Develop better solutions for your business partners
3. Increase alignment in your organization in your approach to analyzing data
4. Improve return on your investment in data and technology
5. Improve your business results

Use the category management framework to create a strategic approach in your business that will ultimately help you to improve your business results – whether or not you have category management training or background.